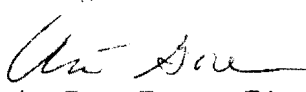


Memorandum

To: Honorable Betty T. Yee, Chair
Honorable Jerome E. Horton, Vice Chair
Senator George Runner, Second District
Honorable Michelle Steel, Member, Third District
Honorable John Chiang, State Controller

Date: January 14, 2011

From: 
Anita Gore, Deputy Director
External Affairs Department

Subject: **2011 Calendar Year Outreach Event Plan**

Attached for your reference is the Board of Equalization (BOE) Outreach Event Plan for calendar year 2011. In addition, to a list of events, the plan includes:

- 2011 Online Seminar Projects
- Summary of 2010 Events and Online Seminar Statistics

As shown on the attached plan, the BOE will sponsor or participate in:

- 60 Small Business Seminars
- 10 Nonprofit Seminars
- 3 VITA Seminars
- 11 E-Services Seminars
- 15 Statewide Small Business Events
- 10 AB71 Cigarette Tax Classes
- 100 Speaker's Bureau Requests
- 289 Basic Sales and Use Tax and Return Preparation District Office Classes

The Outreach Division is working to finalize specific dates, times and venues and will be working closely with Board Member staff to ensure another successful seminar season. If you have any questions or would like to make any changes to the event schedule, please contact Ms. Kari Hammond at (916) 324-2507.

KKH:kh

Attachments

cc: Ms. Kristine Cazadd
Mr. Alan LoFaso
Ms. Regina Evans
Mr. Sean Wallentine
Mr. Louis Barnett
Ms. Marcy Jo Mandel
Ms. Anita Gore
Mr. David Gau
Mr. Jeff McGuire
Mr. Randy Ferris
Ms. Elizabeth Houser

State Board of Equalization

Outreach Services Division – 2011 Outreach Plan

*Overview, 2011 List of Events &
2010 Event Summary*

January 10, 2011

- 60 BOE sponsored seminars/events
- 10 State Controller Office seminars
- 10 AB71 Cigarette Tax classes
- 7 TRA Outreach events
- 100 Speaker's Bureau requests (includes 15 statewide events)
- 289 Sales and Use Tax and Return Preparation classes

- 35 Small Business seminars
- 10 Nonprofit seminars
- 10 State Controller Office(SCO) Business and Nonprofit seminars
- 3 Volunteer Income Tax Assistance (VITA) seminars
- 1 Career Symposium
- 11 E-services seminars
- 10 AB71 Cigarette Tax classes
- 100 speaker bureau requests

Since 2009, OSD has reduced events costs by 51 percent by eliminating venue and equipment rentals, and reducing postage and travel. Travel costs have been reduced by 50 percent by scheduling events more efficiently and reducing the number of staff who travel (2-3 events per week versus 1 per week, 1 staff person/per event).

The Basic Sales and Use Tax and Return Preparation classes are sponsored and coordinated by the Sales and Use Tax Department. The Taxpayers' Rights Advocate is independent of the External Affairs Department, Outreach Services Division and coordinates and plans TRA participation at events, speaking engagements and classes.

In 2010 the online seminars received 394,656 visits.

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Outreach Services Division-
Seminars and Speaker's Bureau

In 2011 OSD will add the following online educational tools to the BOE website.

- Mandarin and Korean Sales and Use Tax Seminars
- How to Open a Seller's Permit Video
- Filing an Organizational Clearance Video
- Time Value of Money
- Resale Certificate
- Purchases from Out-of-State
- CROS Tutorial
- Appeals Training Tutorial

2011 Events/Speaking Engagements/Classes

Small Business Seminars (36)

Topics include: Sales and Use Tax, State Enterprise Zones, How to Start a Business, How to Write a Business Plan, State Payroll Issues, Employee vs. Independent Contractor, Federal Tax Updates, Local Business Resources, Marketing Your Business, Home-based Business, How to Avoid Common Sales and Use Tax Problems, Record Keeping, Small Business Contracting Opportunities, How to Finance a Small Business, etc.

District 1, Chairwoman Yee-0

District 2, Senator Runner-4

4 Cities TBD

District 3, Board Member Steel-12

Huntington Beach

Long Beach

Carlsbad

Westminster

Anaheim

Costa Mesa

Fontana

Riverside

Palos Verdes

Chula Vista

South Riverside County

Imperial

District 4, Vice Chairman Horton-20

Dominguez Hills

Long Beach

18 Cities TBD

Tax Seminars for Nonprofit and Faith-based Organizations (10)

Topics include: Sales Tax, Property Tax Exemptions, State Income Tax-FTB, IRS Form 990, Regulations/Rules for Fundraisers, Employment Taxes, Income Tax Exemptions

Presenters Include: BOE SUTD, PTSD, IRS, EDD, FTB, and Attorney General's Office.

District 1, Chairwoman Yee-0

District 2, Senator Runner-0

District 3, Board Member Steel-6

Fullerton

San Diego

Lake Forest

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1000 JOURNAL OF CLIMATE

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Outreach Services Division-
Seminars and Speaker's Bureau

AB71 Cigarette Tax Classes (10)

Interactive classes on its Cigarette and Tobacco Products Licensing program and related tobacco tax laws. The classes are designed to inform, answer questions, and help California sellers of cigarettes and tobacco products understand their requirements and avoid penalties.

District 1, Chairwoman Yee-2

Oakland

San Jose

District 2, Senator Runner-4

Eureka

Stockton

Fresno

Porterville

District 3, Board Member Steel-2

Riverside

El Cajon

District 4, Vice Chairman Horton-2

Culver City

West Covina

Non BOE Sponsored Events (15)

These annual events are sponsored and coordinated by nonprofit or community-based organizations throughout the state. These community partners invite the BOE to participate at these events by conducting workshops, staffing exhibit tables, and or including information in the event programs.

Craigslist Nonprofit Boot Camp-Berkeley

Compass Point Nonprofit Conference-Bay Area

Governor's Small Business Day-Sacramento

Public Purchasing Officers Event-Sacramento

Native American Day-Sacramento

Hispanic Chambers Annual Conference-Orange County

Thai Entrepreneurial Annual Event-Orange County

Biz Con-Anaheim

Filipino Chamber Annual Business Expo

Asian Business Association Business Development Day-Orange County

Asian Expo-Los Angeles

Small Business Economic Summit-Los Angeles

Women's Small Business Expo-L.A.

Small Business Mixer-L.A.

Public Purchasing Officers Event-Pasadena

Outreach Services Division-
2011 Outreach Plan & 2010 Event Summary

Event History (2010)

BOE participated in or sponsored 368 events/speaking engagements/classes in 2010, outreaching to 23,000 taxpayers.

- 23 BOE Sponsored Events
- 85 Speaker's Bureau requests
- 7 Taxpayers' Rights Advocate (TRA)
- 16 AB 71 Cigarette classes
- 227 District Office Sales and Use Tax and Return Preparation Classes

District 1, Chairwoman Yee (60)

Small Business Seminars-0

Nonprofit Seminars-0

Speaker's Bureau Requests-19

6-Small Business

1-Chinese Delegate

2-Industry Specific

1-Nonprofit

9-Tax Professionals/Practitioners

AB71 Cigarette Tax Classes-4

Fairfield

Santa Rosa

San Francisco

San Luis Obispo

Basic Sales and Use Tax District Office Classes-37

4-San Francisco

6-Oakland

10-San Jose

5-Salinas

8-Santa Rosa

4-Suisun City

District 2, Acting Board Member Alby (62)

Small Business Seminars-4

Gas Tax Swap Seminar

Shasta Small Business Seminar (co sponsored with State Controller's Office)

Sacramento Small Business Forum

Fresno Small Business Forum

Nonprofit Seminars-1

San Bernardino Nonprofit Seminar (co sponsored with Board Member Steel)

Speaker's Bureau Requests-20

10-Small Business

2-Industry Specific

1-Nonprofit

7-Tax Professionals/Practitioners

Outreach Services Division-
Seminars and Speaker's Bureau

AB71 Cigarette Classes-4

Visalia
Lancaster
Bakersfield
Ventura

Basic Sales and Use Tax and Return Preparation District Office Classes-33

4-Ventura
4-Bakersfield
10-Sacramento
4-Redding
11-Fresno (6 Basic Sales and Use Tax, 5 Return Preparation)

District 3, Board Member Steel (97)

Small Business Seminars-8

Long Beach Small Business Seminar (co sponsored with Board Member Horton)
Palos Verdes Business Seminar
Huntington Beach Gas Tax Swap Seminar
Anaheim Small Business Seminar
Santa Ana Small Business Seminar
Imperial County Small Business Seminar
Westminster Tobacco & Alcohol Business Seminar
San Diego Restaurant Industry Business Seminar

Nonprofit Seminars-5

San Bernardino Nonprofit Seminar
Long Beach Nonprofit Seminar
Orange County Nonprofit Seminar
San Diego Nonprofit Seminar
Fullerton Nonprofit Seminar

AB71 Cigarette Classes-4

Palm Desert
Riverside
Irvine
San Diego

Speaker's Bureau Requests-21

15-Small Business
2-Industry Specific
1-Nonprofit
3-Tax Professional/Practitioners

Basic Sales and Use Tax and Return Preparation District Office Classes-59

17-Irvine (7 Basic Sales and Use Tax, 10 Return Preparation)
23-Riverside (7 Basic Sales and Use Tax, 16 Return Preparation)
2-Rancho Mirage (1 Basic Sales and Use Tax, 1 Return Preparation)
6-San Diego (4 Basic Sales and Use Tax, 2 Return Preparation)
11-San Marcos (Basic Sales and Use Tax)

Long Beach Small Business Seminar
Los Angeles Small Business Seminar
Connecting Women to Power-Global Economy Seminar

Los Angeles Nonprofit Seminar
Long Beach Nonprofit Seminar (co sponsored with Board Member Steel)

CSU Dominguez Hills Career Pathways Symposium

16-Small Business
1-Industry Specific
1-Career Day
7-Tax Professionals/Practitioners

West Covina
Culver City
Van Nuys
Norwalk

29-Norwalk (15 Basic Sales and Use Tax, 14 Return Preparation)
21-Van Nuys (11 Basic Sales and Use Tax, 10 Return Preparation)
32-West Covina (16 Basic Sales and Use Tax, 16 Return Preparation)
16 Culver City (8 Basic Sales and Use Tax, 8 Return Preparation)

Governor's Conference/Small Business & Entrepreneurship II
Metro Business Expo
California Small Business Day
2010 Annual Income Tax Seminar-State Bar Association
Northern California Assessor's Association
Albany Law School Meeting and Webcast
34th Annual Tax Update Seminar
2010 California Assessor's Association Conference

Chula Vista Veterans Business Seminar
Chino Small Business Seminar
Los Angeles Small Business Seminar
Lemon Grove Small Business Seminar
Van Nuys Women's Financial Literacy Seminar
Ontario Small Business Seminar

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10

External Affairs Department & Outreach Services Division

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Division Manager, Outreach Services Division

9

Outreach Services Division-
2011 Outreach Plan & 2010 Event Summary

Event Type	District 1	District 2	District 3	District 4
2010				
Small Business Seminar	0	5	8	3
Tax Seminar for Nonprofits	0	0	5	2
State Controller's Seminars	0	4	4	2
Speaker's Bureau Request	19	20	21	25
AB71 Class	4	4	4	4
Basic Sales and Use Tax Class	37	33	59	98
VITA Assistance Day	0	0	0	3
Career Day	0	0	0	1
2010 CY Total	60	66	101	138
<i>*Total represents events in each district, does not include TRA</i>				
Event Type	District 1	District 2	District 3	District 4
2011				
Small Business Seminar	0	4	12	20
Tax Seminar for Nonprofits	0	0	6	4
State Controller's Seminars	2	2	3	3
Speaker's Bureau Request	25	25	25	25
AB71 Class	2	4	2	2
Basic Sales and Use Tax Class	56	34	85	104
VITA Assistance Day	0	0	0	3
Career Day	0	0	0	1
eServices Seminars	2	2	4	3
2011 CY Total	87	71	147	165
<i>*Total represents events in each district, does not include TRA</i>				

Board Sponsored Events (by calendar year)*

Calendar Year	# of Events	Avg Cost per Event w/o OSD Salaries**	Total	Avg Cost per Event w/OSD Salaries**	Total
2009	14	\$ 6,989	\$ 97,846	\$ 32,078	\$ 449,092
2010	23	\$ 4,980	\$ 114,540	\$ 17,026	\$ 391,598
2011	46	\$ 3,735	\$ 171,810	\$ 10,155	\$ 467,130

OSD efficiencies that have allowed cost per event reduction of approximately 50%:

Reduced postage (email)

Reduced Travel (1 person versus 4)

Reduced Printing (# of invites, eliminated posters and flyers)

Reduced handouts/publications (new pub CD)

Reduced Shipping

Streamlined Event Registration (online & new database)

Streamlined Event Agendas

Community Partner Venues (no cost)

Outreach Listserv

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Outreach Services Division (by fiscal year)	FY 09/10	FY 10/11	FY 11/12
OSD Salaries	\$ 291,974	\$ 284,713	\$ 291,974
Actual/Projected Expenditures	\$ 320,230	\$ 272,366	\$ 320,415
Surplus/Deficit	\$ (28,256)	\$ 12,347	\$ (28,441)

OPERATING EXPENSES	\$ 100,000	\$ 100,000	\$ 100,000
Actual/Projected Expenditures	\$ 98,500	\$ 99,500	\$ 99,999
Surplus/Deficit	\$ 1,500	\$ 500	\$ 1.00

OSD Salaries and OE	\$ 391,974	\$ 384,713	\$ 391,974
Actual/Projected Expenditures	\$ 418,730	\$ 371,866	\$ 420,415
Surplus/Deficit***	\$ (26,756)	\$ 12,847	\$ (28,441)

*Board sponsored events include Small Business Fairs and Tax Seminars for Nonprofit Organizations

**Costs include OSD Staff, travel, in-house printing, postage, venue costs, and BOE program resources

***2010/11 projected surplus due to vacancies